

# RxOffice®

from Indisoft

## Product Suite

June 10<sup>th</sup> , 2014

Pramod Karachur  
Indisoft LLC

## CONFIDENTIALITY REMINDER

This presentation is subject to the Non-Disclosure agreement signed by your organization and IndiSoft. Information that you are about to see and hear is strictly confidential.

The Agreement prohibits disclosure of any information outside your organization. And use of information is strictly limited to the stated purposes in the signed Non-Disclosure Agreement.

# Agenda

- (10 minutes) General
  - Introductions
  - Indisoft Company Overview
  - RxOffice Platform
- (35 minutes) Product Suite
  - Create Mediation Case
  - Import DHCD NFMC level 1 and level 2 report
  - Import all other Loss Mit cases in Level 1 and Level 2 Format
  - Quick tour: RxOffice Premium Counseling System
- (15 minutes) Q&A

Listed by Inc. 500 | 5000 as one of America's fastest growing companies in past four years: 2013, 2012, 2011 and 2010

Only collaborative platform that has connected the dots (internal and external) in the marketplace.

Won the coveted *Mortgage Technology* 10x award in 2010  
*A Computerworld Honors Laureate* for visionary applications 2013  
Won SmartCEO Award in 2013

A Microsoft Independent Software Vendor (ISV) Silver Partner, 2013  
RxOffice products used by:  
Top Investors, Private Mortgage Insurer,  
Top 5 Auditing Firm, Law firms,  
Thousands of Counselors & Vendors

Top 21 Servicers representing more than 90% of mortgage loans in USA use RxOffice for counselor communication, compliance audit, etc. (varies by client)

Has credibility with Federal and State Regulators:  
OCC  
Federal Reserve Board (FRB)  
State Housing Agencies  
...

## Foundation of RXOffice® Platform

All RxOffice platform products share the RxOffice Foundational components starting with Workflow. Products may then specialize in differing problem domains to meet unique business applications.

### Integration

Open Architecture philosophy supports information pulls in and out for automation needs

### Collaboration and Messaging

Portal concept supports differing internal and external information views supporting complex workflow

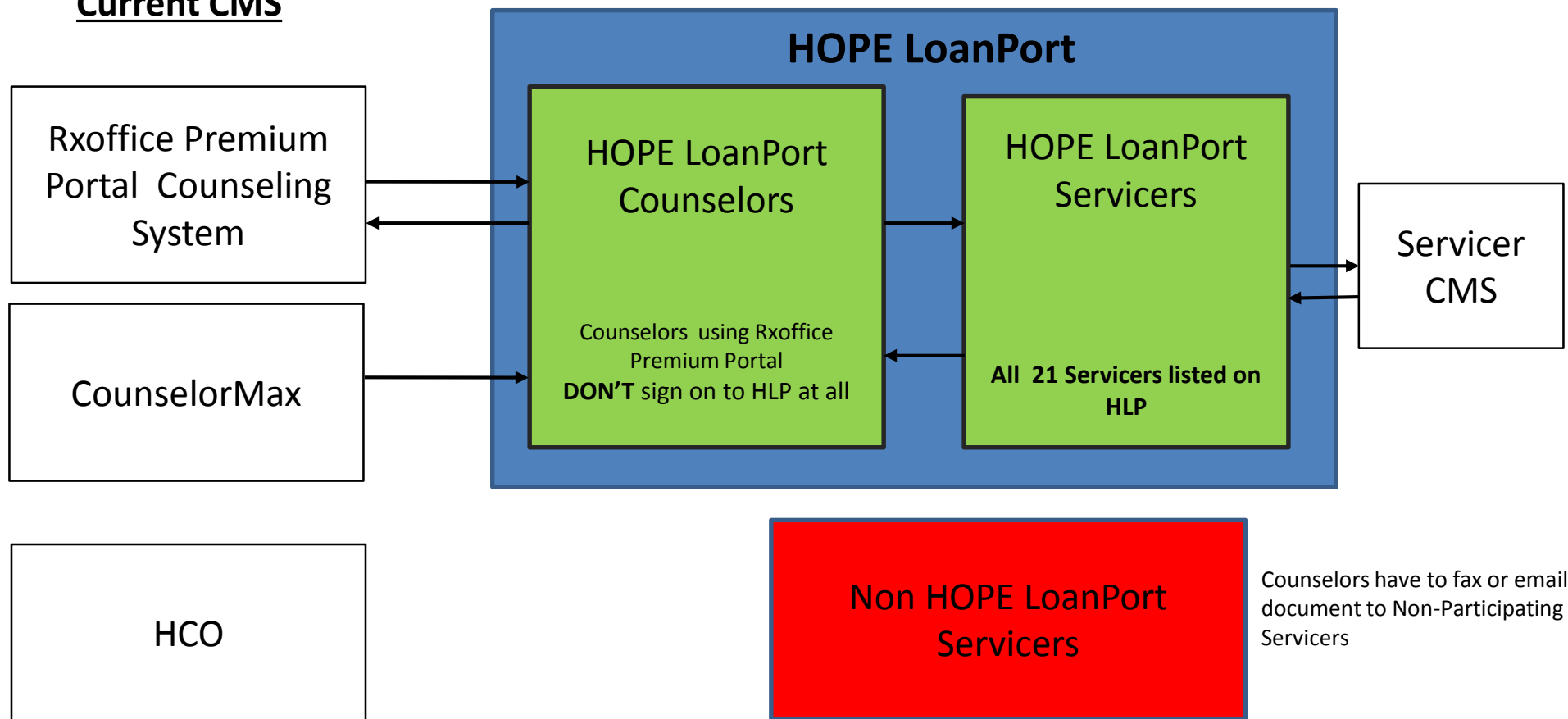
### Document Management

Full-service historical document repository; available advanced features such as OCR and annotation

### Workflow

Structured multi-party workflows; transfers of control; agent assignments; integration

## Current CMS



## Immediate Advantages

- Using Rxoffice Premium Portal, one click submits case to HLP's participating servicers
- Messages, notes and case status updates directly into Rxoffice Premium Portal.
- Counselors will not have to log onto HLP
- To generate NFMC report, 2 or 3 clicks are required. Rxoffice Premium Portal is HUD CMS approved and is on HUD CMS list.
- **For Non Participating Servicers, counselors have to send documents through Email or Fax.**

## Key products built on the RxOffice Foundation

RxOffice Premium	HUD Certified Case Management System for Counseling Agencies to manage all phases of borrower outreach

# Link to Import NFMC Report

localhost:50199/Webpages/DashboardEmployeeOpt2.aspx

HomeFreeUSA  
Counselor Portal  
User : HomeFree-USA User Last Login: 6/9/2014 5:24 PM

Quick Search  
Select Any Case #  
Case # GO

Escalation Help Sign Out

Pre Purchase Summary Import Borrower Case Import Prospect Case

Dashboard Case Search Intake Case Queue New Case Tasks Reports Messages Admin Reminder Event Help

Alert Center

View Task for HomeFree-USA User View Recent Cases

Recent 25 Cases for User HomeFree-USA User

Case Type Post-Modification Session 1 State Maryland Status

Case ID	Case Type	Client	Loan#	Opened Date	Day Opened	Designated User	Update Date	Access Date	
107959	Post-Modification Session 1	Oxford Tester	10089765444	02/18/2014	11		02/18/2014	06/09/2014	
107960	Post-Modification Session 1	Real Tester	1004613213214	02/18/2014	11		02/18/2014	06/09/2014	
107940	Post-Modification Session 1	Oxford Tester	1004613213214	02/18/2014			02/18/2014	06/09/2014	
107879	Post-Modification Session 1	Oxford Tester	1008444444444	02/17/2014	112		02/17/2014	02/17/2014	
107895	Post-Modification Session 1	Oxford Tester	10046131326	02/17/2014	112		02/17/2014	02/17/2014	

Records 1 - 5 of 9

Messages

Case Id	Loan#	Subject	Sender	Date & Time
108867	2342355	Case Status: Intake Pending Mail changed to Intake Mailed for	Dummy User	03/21/2014 03:08:43 PM
108867	2342355	Case Status: Case Boarded changed to Intake Ready for	Dummy User	03/21/2014 03:07:16 PM
108872	15478545411	Case Status: Intake Pending Mail changed to Intake Mailed for 15478545411	Dummy User	03/21/2014 02:23:07 PM
108872	15478545411	Case Status: Intake Ready changed to Intake Pending Mail for 15478545411	Dummy User	03/21/2014 02:22:31 PM
108872	15478545411	Case Status: Case Boarded changed to Intake Ready for 15478545411	Dummy User	03/21/2014 02:21:53 PM

javascript:Dolt("#", "5", "");

Admin User List Agency Information Announcement Change Password Manage Roles Assign Roles User Profile Manage Workgroups Manage Workgroup Hierarchy Manage Client Import Case NFMC Import Case DHCP Import Case Import duplicate NFMC cases HCO Import Cases Notes/Email Template User Assignment Reset Borrower Password Educational System Generate Borrower Login

No Announcement available !

DHCD NFMC Clients



localhost:50199/Webpages/DHCPImportCases.aspx?Sel=181

HomeFreeUSA  
Counselor Portal  
User : HomeFree-USA User Last Login: 6/9/2014 5:24 PM

Quick Search  
Select Any Case #  
Case #  GO

Escalation | Help | Sign Out

Pre Purchase Summary Import Borrower Case Import Prospect Case

Dashboard Case Search Case Queue Intake Tasks New Case Reports Messages Admin Reminder Event Help

Unread Messages (853) Print

## DHCP Import Cases

Import Cases History

Please upload cases

☐ DHCP ☒ Non-DHCP

Case Type \*

File Name \*  No file selected.

Site Map :: Privacy Policy :: Terms & Conditions

Copyright © 2003-2014 Indisoftware LLC. Patent Pending. All Rights reserved.

- Additional data elements need to be uploaded
- In a form, counselors need to enter
  - Number of mediation eligible clients assisted: Pending Outcomes:\_\_\_\_\_
  - People found HAMP Eligible: Case Client Information:\_\_\_\_\_
  - Mortgage Modified – HAMP: Positive Outcomes:\_\_\_\_\_
  - Referred for legal assistance with Mediation: Pending Outcomes:\_\_\_\_\_

# Q & A